



2016 SMT Retreat & Strategic Planning Work Session

SUMMARY REPORT

Introduction:

On December 1, 2016 a full-day retreat and strategic planning work session was conducted for the City of Fayetteville Senior Management Team (SMT) at the Fayetteville Botanical Gardens. Those in attendance included City Manager (CM) Doug Hewett, Deputy City Manager Kristoff Bauer, Assistant City Manager Jay Reinstein, City Attorney Karen McDonald, and all of the department directors for each City of Fayetteville department. The session was professionally facilitated by Consultants Marcia Shepherd Johnson and Terrie Hutaff.



The purpose of the day's work session was to lead the SMT in an organized discussion of all current Targets for Action (TFA) and to jointly decide a priority level for each one listed as active. The SMT participants were informed that their feedback and recommendations regarding TFA priorities would be used by the CM in preparation for the City Council (CC) Strategic Planning Retreat scheduled for February 2017, and the following budget discussions in March.

Besides the goal of prioritizing the TFA, it was the CM's desire that the SMT retreat provide an opportunity for the SMT to work on building team unity and trust through a consultant led discussion that centered on how to improve how the team functions. They were asked what they felt were the team's strengths, weaknesses and what they needed from the CM in terms of overcoming obstacles, improving work flow, and building constructive relationships.

The desired outcome of the work session was to leave with a list of priorities that were vetted by the entire team, and to provide opportunities for sharing information, differing perspectives, and discuss current performance issues.

Background

Prior to the scheduled retreat, the Consultants held discussions with CM Doug Hewett and Rebecca Rogers-Carter, Director of Strategic Performance Analytics to define the scope of the project and their desired outcomes in order to clearly define the target for success for the event.

Both the CM and Ms. Rogers-Carter provided background information on both the SMT and the current CC to convey some of the ongoing issues impacting the organization. Some of the areas in which they felt performance could be improved included the following:

- Improve clarity and cohesiveness on roles, boundaries, standard operating procedures/protocols and communication flow when resolving issues
- Improve SMT team unity, trust, engagement, and change management
- Build a more positive culture through the application of the "learning organization" principles
- Better performance measures that track benchmarks and what clearly define "success"

There were several other concepts that the consultants wanted to weave into the design of the work session in order to lay a foundation for the rest of the day's work that included:

- Reinforcing the principle that the purpose of strategic planning is not just “good to do” but must be done to preserve the City’s fiscal health and overall well being
- That a good strategic plan “begins with the end in mind” and can be realistically achieved with the resources available (human, financial & technical), and will only succeed if it has the full support of the SMT, CM, and CC
- Without the required resources to achieve all of the TFA, tough decisions will need to be made to determine the priority levels of current TFA and to decide whether some must be put “on hold” until more resources are available
- That a strategic plan should be used in partnership with the community to transparently demonstrate fiscal prudence and accountability through the use of defined targets for action and the benchmarks to completion



I. Processing and Prioritizing the Targets for Action

Before moving into the review of the current list of on-going TFA, the consultants provided an opportunity to review the list of the already-completed TFAs and celebrate those accomplishments. After celebrating the completed TFA, the consultants laid out the process for jointly prioritizing the ones still in progress. The process and priority definitions were as follows:

- The remaining TFA were posted on charts before the group
- The department director with lead responsibility for each TFA gave a one-minute summary of the project and its current status in terms of estimated time of completion, and suggested a priority level (A, B, C, or D) based on the chart below
- Members of the group were allowed to ask questions or seek clarification
- A vote was taken and the results recorded on the chart (both pro and dissenting votes), with the majority vote being the determining factor in what priority level the TFA was given
- Afterwards, the group reviewed the list of TFA categorized by priority level and were provided another opportunity for comments and suggestions
- SMT members were told that the CM would use this information to prepare for the CC retreat in February
- All results taken from this exercise are captured in a chart (sent as an attachment to an email). See **Appendix**.

Category A	Critical to the City's Mission	<ul style="list-style-type: none">• <i>Legally mandated</i>• <i>Required for funding</i>• <i>Penalty if not done</i>• <i>Required for survival</i>
Category B	Important to the City's Mission	<ul style="list-style-type: none">• <i>Improve performance</i>• <i>Maintain infrastructure and facilities</i>• <i>Protect financial future</i>• <i>Plan future development</i>• <i>Build organizational competency and capacity</i>• <i>Expand tax base</i>• <i>Reduce risk</i>• <i>Allow citizen's mobility</i>
Category C	Community Value	<ul style="list-style-type: none">• <i>Community willing to pay for providing</i>• <i>Makes people choose to live in City</i>
Category D	On Hold	<ul style="list-style-type: none">• <i>Will not undertake at this time</i>

II. Group Discussion: Making the SMT a Higher Functioning Team

Following the group TFA prioritization work that took up the majority of the day, the SMT was allowed the opportunity to participate in a relaxed discussion of how well the SMT is functioning as a team and what could be improved. The following is a list of the discussion questions they were asked and a summary of the most common responses:

1. *In your opinion, what is going well for this team? What are the team's strengths?*

- *Hardworking, professional, technical and practical knowledge and experience, and commitment to the organization and to excellence*
- *Great people! Intelligent critical thinkers that support and respect or each other! Progressive! (4)*
- *Teamwork on major events; lack of territorial boundaries and have each other's backs; Sharing of lessons learned; good listeners!*
- *Compassionate, Adaptive, resilient, and care about people*
- *Collectively want to improve city—responsiveness*
- *Community knowledge and professional experience; Strong SME's—willingness to discuss any topic*
- *Customer focused*
- *Commitment to the performance management system*

2. *What do you think are some of the areas in which this team could improve? How could this team work together more effectively?*

- *Need to reach across lines and subject matter expertise to improve workflow between departments and work toward an organizational wide perspective*
- *Improve the effectiveness of our meetings; allow for more group discussions for things that affect others, including discussing the "undiscussables" and understanding the "whole story", as well as display greater respect for each other during meetings (avoiding side bars, phones, etc.)*
- *Honor internal commitments and professionalism and improve accountability on deadlines and commitments*
- *Need for greater "candor" and a more creative environment, and improvement of our "diplomatic assertiveness" to continuously improve our insights*
- *Reduce "silos" by becoming aware of others work*
- *Emphasis on policy writing*
- *Developing an understanding of political pressures and embracing risk*

3. *What obstacles do you face as a team? What threatens your cohesiveness?*

- | |
|--|
| • <i>Different working styles</i> |
| • <i>Effectively managing change, both in leadership transition, personnel and processes</i> |
| • <i>Things coming in at last minute</i> |
| • <i>The budget process – competing for limited financial resources</i> |

4. *What do you need from the CM in order to be more effective in your role as a SMT member?*

- | |
|--|
| • <i>More direction regarding internal customers and service support departments</i> |
| • <i>Understanding what the CM wants and how he processes information</i> |
| • <i>Ensuring the CM gets all sides of an issue</i> |
| • <i>Clarification of roles ... interactions with the CC</i> |

Work Session Participant Feedback

We received 19 completed SMT participant feedback forms of which 4 people rated the work session a "5", 14 people rated the day a "4", and one person rated it a "3". The median score is **4.2**. Please see **Appendix C** for further information on the results.

Senior Management Team

Work Session Participant Feedback Form

1. What parts of today's work session did you particularly like or find the most useful?

2. What about today's session would you have done differently? What improvements would you suggest?

3. What did you think about the process we used to categorize and prioritize the Targets for Action? Did you find it useful or would you have done it differently?

4. Please provide an overall rating of today's work session: *(Check box)*

Poor	1	<input type="checkbox"/>
Fair	2	<input type="checkbox"/>
Neutral	3	<input type="checkbox"/>
Good	4	<input type="checkbox"/>
Excellent	5	<input type="checkbox"/>

12

Shepherd Johnson Consulting
12/8/2016 12:15 PM

Summary

The full-day retreat provided a great opportunity for discussion and revealed a variety of perspectives and positions from the participants. From the voices heard during the work session, it was evident that there were differences in understanding of the city's strategic planning process, the desired outcomes of the TFA, the difference between on-going operations and projects, and which TFA are higher priority. This reveals a need for additional facilitated discussions in order to bring everyone together on the "same sheet of music" and to improve team cohesiveness and understanding of expectations.

Here are some of the issues that need further discussion, clarification, and to be shared with CC in moving forward into the FY 2017-18 CC strategic planning session in Feb 2017:

- Need CC to define the level of detail that the CC wants from staff in their reporting of progress on TFA
- A discussion of the roles of SMT in terms of their interactions with CC and the policies that guide those interactions
- Additional SMT Training/instruction on Project Management, to include defining outcomes and benchmarks, and delineating between projects versus on-going operations
- Further discussion on what each SMT needs from the CM and what the CM expects from them, as well as further training in the skills associated with the Team Effectiveness Model to improve resolving conflicts, solving problems, and discussing the "undiscussables."
- Because there are so many TFA that are still works in progress and need time and resources in FY2017-18 to bring to completion, the staff will have limited resources to support new initiatives. An important part of the CC strategic planning session will be the discussion of the need to greatly limit anything to be added to FY18 and spend more time discussing and prioritizing the TFA still in progress, to include possibly putting some lower priority TFA on hold.

Appendix:

Targets for Action:
Categorized by Priority & Goal